

Suncoast Chapter



July/August 2016

From the President's desk...



The Suncoast Chapter was awarded *BEST CHAPTER OF THE YEAR* for the 4th year in a row at the FSEA convention last week! Kudos to the members for their support in making our chapter grEAT!!

July marks the beginning the Board's second year in office. This year we are focusing much of our efforts on Goal 2 of the FSEA strategic plan which is educating our members. To achieve this goal we will be putting together a series of 4-hour roundtable workshops available to Chapter members beginning in late summer. Although we still have to work out many of the details, we are planning on a facilitator- lead roundtable discussion on various topics.

Attendees would be given a case study prior to the event to research and the group will discuss and complete the forms associated with the problem. Possible workshop topics may include: Death of a Taxpayer, Non-Profit filing and reporting, Foreign Asset reporting, Small Business Startups & planning, Real Estate Issues, Collections, and possibly a few on small office management such as how to advance to the next level for the sole practitioner & disaster planning. While not eligible as IRS continuing education they would qualify for credit from NAEA. If there is a particular topic you think would work out well for this format please let me know.

In addition we are also considering offering several QuickBooks & Xero workshops to provide some tips and tricks on the software. Attendees would have the opportunity to bring their laptops and their questions.

We have just launched a sponsorship program for the monthly chapter dinner meetings and are actively soliciting for those sponsors who have products that align with our profession. If you have a vendor that might be a good fit please make Laura Vensel, EA or Nichole Morales, EA aware of their information. The presentations will take place during the dinner portion of the meeting and the fees paid will be earmarked for the educational committee budget. It is our intent to use the funds to offset the cost of providing workshops to our members and possibly bringing in outside speakers.

I want to remind you that the Chapter membership dues renewal date is July 1st. This is separate dues from NAEA/FSEA. You must be a member in those 2 organizations to enable you to have membership within our chapter. The cost of annual chapter membership is \$40.

It takes everyone's participation to make a chapter. That said, beginning this year we are asking all members to commit 5 hours of volunteer time as part of their membership in the chapter. This could be helping set up for an event, assisting where needed with a committee, presenting a topic to the group, making phone calls, etc. At the July meeting there will be sign-up sheets available where you will have the opportunity to volunteer your services.

On October 23rd there will be an After Tax (*Extension*) Picnic at Philippe Park in Pinellas which is open to all. The park has a playground, horseshoes and a many other activities including an Indian Burial Mound! We are considering Sonny's BBQ to cater the event.

We had hoped to have credit card processing available for the July dinner meeting as well as a Pay Link option on your emailed membership invoices. We have hit a few roadblocks but still hope to provide that convenience in the near future.

December 8th is the date of our Holiday Party. This year the venue will be the Crafted Plate where we have secured a private room. The restaurant is located in the Marriott Clearwater Hotel at 12600 Roosevelt Blvd.

A lot of events have been planned for the chapter over the next year. If you haven't signed up or renewed your membership please take a moment to do so. You won't want to miss anything!!

I look forward to seeing everyone at the upcoming events!

Karen Wiseman, EA, NTPIF
President Suncoast Chapter FSEA

2015 - 2017



Friday, July 1st – North Clearwater Breakfast Roundtable
I-Hop Restaurant 8:30am
 30200 US Hwy 19 North, Clearwater

Friday, August 5th – Pinellas Park Breakfast Roundtable
Perkins Restaurant 8:30am
 8841 Park Boulevard, Seminole

If you have never been to a breakfast you are missing out on some great tax discussions in a small group setting. Additionally, all those in attendance are asked to bring \$1 + your business card. The \$1 will be part of a 50/50 raffle and the business cards will go into a pot. Before leaving, everyone will draw a card from the pot and whoever's business card you pick, will be your mentor for the month. If you have a tax issue, need to discuss a position on a return or you have a practice issue ...you are not alone, you will have a mentor! It is a great way for us to help each other out and learn at the same time!

July 28th – 5:30 pm – Chapter Dinner Meeting

Topic: International Tax Topics (1040NR, ITIN)

Speaker – Karine Bauer, EA, CCA

August 25th – 5:30 pm – Chapter Dinner Meeting

Topic: Discussing Unusual Business & Individual Deductions

Speaker – Jeffrey Schneider, EA, CTRS, NTPIF

Come enjoy food and fellowship while earning CE credits at our monthly Chapter dinner meeting. The cost of the dinner and the CE credits - \$40 member/\$55 non-member and collected at the door. Please RSVP to karen@wisemantax.com if you plan to attend and didn't get an email invite.

Feather Sound Country Club,
2201 Feather Sound Drive, Clearwater, FL

From the Suncoast Chapter Board...

Entertainment Committee **Chair:** *This could be you!!*

We are still in **desperate** need to fill the opening in this committee.

Education Committee: **Chair:** Nichole Morales, EA nichole@maacpas.com

Nichole has available an extensive list of tax topics which include PowerPoint presentations and handouts for anyone who is comfortable in presenting education to the group. If you would be interested in reviewing the list or presenting a topic please contact Nichole. All presentations must be 2 hrs.

Membership Committee : **Chair:** Ken Santorello, EA krs1477@gmail.com

July 1st kicks off our membership drive. Ken will be in contact with current members to remind them to renew. If you have any questions about joining or the benefits included in your chapter membership, please let him know. Also if you know of any EA's that might be interested in our chapter please pass along their information to Ken.

Public Relations Committee **Chair:** Nereida Ehl, EA nereidaehl1@gmail.com

This committee is an important part of the group and it is a BIG job! They are in need of committee members to help out with small tasks. Nereida will be working with the FSEA PR chair to promote the EA designation to the public.

This committee also encompasses the social media aspect of our outreach into the community by the chapter. Karine Bauer, EA stepped forward last year and maintains our Facebook page. She has done a wonderful job of posting pictures and announcements of all our events.

We would like to have someone step up and monitor our Linked-In site. Since it is a closed group, that person would oversee the site and work with membership to confirm anyone requesting to join, are members of the Chapter.

Also under this committee's umbrella is the newsletter. I am now in my fifth year as the Editor and am struggling to have the personal time and resources to put together the newsletter every month. Instead of monthly the newsletter is now coming out every other month. If you have an interest in becoming the Editor...please let me know. karen@wisemantax.com

Chapter name tags are available to all members for purchase. Contact Laura to place your order.

MEMBERSHIP IN SUNCOAST

We welcome all EAs to attend our monthly chapter dinners (CE credits), monthly breakfast networking, and all other chapter workshops and events. We encourage all EA's in our Chapter area to join.

The Chapter Membership dues is \$40.00 annually.
Associate Chapter membership is available to non-EAs for \$40.00 annually.

All membership inquiries can be directed to Ken Santorello our Membership Chair

YOU MUST BE A MEMBER IN GOOD STANDING WITH BOTH NAEA AND FSEA FOR MEMBERSHIP

Note: Membership in NAEA/FSEA does not automatically enroll you in the Chapter.



Results from Alternative Tax's Shred Fest

Shredded 11,800 lbs
Collected approximately 200 lbs of food
\$100 Cash donations to the Teddy bEAR along with
Unknown quantities of teddy bEARs!
AWESOME JOB!!!

SPONSORS

One of the benefits when attending convention is the ability to talk to the vendors and sponsors expanding our knowledge of the products and services available to our profession that could make our lives both easier and more efficient. Below is a list of the sponsors that were at the FSEA convention this year. Please take a moment to take a look at what products they offer.

Global CPE – www.globalcpe.com 813-785-9721
Pension Services – www.pensionspecialists.com 888-412-4120
Canopy – www.canopytax.com 801-830-3674
Cetera Financial Specialists – www.ceterafinancialspecialists.com 847-330-7919
Office Tools – www.officetools.com 888-667-8440
CFS Tax Software - www.taxtools.com 800-343-1157
Drake Software – www.drakesoftware.com 800-890-9500
Gleim – www.gleim.com 352-375-0772
Legal Shield - www.fajames.com 612-205-6526
Tax Risk Management – www.taxriskmanagement.com
Tax Help Software – www.auditdetective.com 404-910-360
TASC – www.tasconline.com 888-595-2261
Getnetset – www.getnetset.com Customized websites for Accounting Professionals

News from...



Your new FSEA Chapter Board was sworn in at Convention.

President: Roberto Pons, EA
 President Elect: Ray Kidwell, EA
 Vice President: David Leidel, EA
 Secretary: Laura Vensel, EA
 Treasurer: Tony Frezza, EA
 Immediate Past President: Michael Carlisle, EA



SUNCOAST CHAPTER BRINGS HOME THE CHAPTER OF THE YEAR AWARD!!



What a great 16 (+2 bonus) hours of education we had in Lake Mary!! The speakers were excellent, the sponsors were excellent and the fellowship was excellent!
 Of the 99 in attendance, 25 were from Suncoast Chapter!

Individual Suncoast members were also issued awards in the following categories:

Mentor of the Year – David Kinser, EA, NTPIF
 EA of the Year – Karen Wiseman, EA, NTPIF

Our newest member Jake Alexander, EA was awarded a Convention scholarship. Congrats!!!

CONVENTION HIGHLIGHTS



\$1,200 was collected during the convention for the 50/50 raffle. Due to the outstanding participation and Candy Grams extraordinary selling acumen we raised the most amount of money this year, half of which will benefit the FSEA education fund

....President's Dinner



.... Somewhere on the beach

**AND NEXT YEAR...
WE WILL BE IN LAKE MARY.... BUT IT WON'T BE AT THE BEACH....**



**FSEA CONVENTION 2017
JUNE 22 – 24, 2017**



A U-haul full of Teddy Bears arrived at Convention this year. I am happy to report that all 69 bags of them went home with attendees to be distributed to children within their local neighborhoods.

If you collect bears at your office please make sure to take a picture before you donate so we can put it up on the FSEA Website!

Kudo's to Jerry Joyce, EA for collecting and bringing all those furry friends to Convention and for all the work you do on behalf of Teddy bEARs for Kids.



The NAEA Member Get a Member Campaign is in full swing! Help the NAEA membership grow...which helps FSEA grow...which helps your local chapter grow.

Earn a \$30 credit to use for NAEA products and Services for every new member you recruit
Your name will also be entered into a drawing to win a prize for each new member you recruit.

NAEA PAC

NAEA PAC Affiliate challenge for this year is set at \$100,000 after last years Goal was exceeded. (Thanks to those of you Floridians who provided your Support) The PAC is our voice in Washington by which the political process to push for necessary reforms and tax code changes in Congress gets done.



As a chapter, we challenge all members to contribute. Donations don't have to be large contributions! If everyone pledged \$5 we can easily reach our goal!!

NATIONAL TAX PRACTICE INSTITUTE – August 1-3 2016 – Las Vegas
Cosmopolitan Hotel
Details available at naea.org

NATIONAL TAX PRACTICE INSTITUTE - November 2016 - Orlando
Rosen Hotel
Registration will open soon

IRS Tax Forum

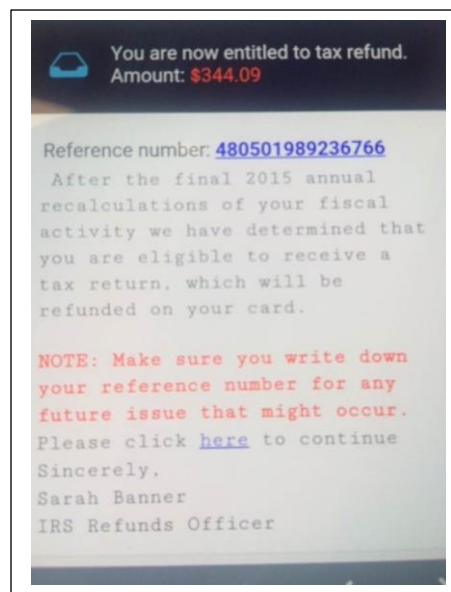
August 30th – Sept 1st, 2016

Hyatt Regency Orlando

Whether you are attending the Forum or would like to volunteer for the day, we are looking for warm enthusiastic members to help out at the NAEA booth. Please contact Ali Schneider our FSEA Executive VP at: evp@fseaonline.org if you can volunteer for a time slot.

They are at it again!

Here is the latest email scam that is going around.





SUNCOAST CHAPTER

THE TAX PROFESSIONALS!

Executive Committee

President Karen M. Wiseman, EA
karen@wisemantax.com
 727-364-7552

Vice President Laura M. Vensel, EA
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 813-924-4226

Treasurer Fred Daus, EA
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 727-230-0713

Secretary Nancy Anderson, EA
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 727-692-1353

Fredrick James
 Attn: Fred Daus, EA - Treasurer
 600 Bypass Drive, Ste 103
 Clearwater, FL 33764

Looking forward...

7/1/16	Chapter Networking Breakfast, North Clearwater 8:30am
7/28/16	Chapter Dinner Meeting 5:30pm
8/5/16	Chapter Networking Breakfast, Pinellas Park 8:30am
8/25/16	Chapter Dinner Meeting 5:30pm
9/2/16	Chapter Networking Breakfast, Tampa 8:30am
9/22/16	Chapter Dinner Meeting 5:30pm
10/7/16	Chapter Networking Breakfast, North Clearwater 8:30am
10/23/16	Chapter Picnic – Philippe Park, Shelter #1 1-5pm